

Pre-Proposal Meeting Summary

S00R2600001 – SFLP & MAHT Audit Services

The following is a summary of items discussed at the Pre-Proposal Meeting held on Wednesday, May 4, 2022 at 10:00 a.m.

This summary is intended to be a general record of the meeting and *does not* constitute an amendment to Request for Proposals (RFP).

- **Introduction:** The meeting opened at 10:05 a.m. The Department of Housing and Community Development (DHCD) Tierra introduced DHCD staff.

The following (DHCD) staff presided;

Paul Dickman, Procurement Officer
Tierra Ali-Said, Procurement Officer
Jackie Wright, Office of Fair Practice
Octavia Robinson, Program Manager/Contract Monitor

One (1) representatives from one (1) unique vendors attended. See Sign-In Sheet under separate attachment labeled “S00R2600001 – SFLP & MAHT Audit Services Pre-Proposal Sign-In Sheet”

- **Overview:** Tierra went over key information of the solicitation.

Solicitation Number: S00R2600001
Title: SFLP & MAHT Audit Services
Questions Due: Wednesday, May 18, 2022, at 2 PM Local Time
Proposals Due: Wednesday, May 25, 2022 at 4 PM Local Time

- **Page 7, Section 1, Minimum Qualifications** - All personnel to be assigned under the Contract, including engagement partners, principal supervisory staff, and management staff shall be licensed Certified Public Accountants (CPAs) in the State of Maryland and meet the continuing professional education requirements of CPAs engaged in the practice of governmental auditing. As proof of meeting this requirement, the Offerors shall provide with its proposal a copy of the current CPA license for all key personnel that will work on this Contract if it is awarded to the Offeror. The Offerors shall have performed at least 5 financial statement audits of government entities within the last five (5) years. As proof of meeting this requirement, the Offeror shall provide the following information for each audit: 1. Name of the client’s organization audited; 2. Name, title, email address and telephone number of point of contact for the organization who can verify that the audits were performed; and 3. The dollar value, type of audit, timeframe, and duration of the contract(s) for audit services for the client’s organization.



- **Page 8, Section 2, Scope of Work** - The Department of Housing and Community Development (“DHCD” or “the Department”) is issuing this Request for Proposals (“RFP”) to solicit a contractor to provide audit services for State Funded Loan Programs and Maryland Affordable Housing Trust. It is the State’s intention to obtain services, as specified in this RFP, from a Contract between the selected Offeror and the State. The anticipated duration of services to be provided under this Contract is five (5) years.
- **Page 29, Section 4.6, Multiple or Alternate Proposals** - Multiple or alternate Proposals will not be accepted.
- **Page 37, Section 4.37 Small Business Reserve (SBR)** – This is a Small Business Reserve Procurement for which award will be limited to certified small business vendors. Only businesses that meet the statutory requirements set forth in the State Finance and Procurement Article, §§ 14-501—14-505, of the Annotated Code of Maryland, and that are certified by GOSBA as a participant of the Small Business Reserve Program are eligible for award of this contract.
- **Page 39, Section 5.1, Proposal Format** - Discusses the Proposal formatting. Information on Proposals must be submitted electronically through eMMA and received by the Procurement Officer no later than the Proposal due date and time indicated on the Key Information Summary Sheet in order to be considered. There is a two-part submission. Offerors shall submit their Volume I – Technical Proposal and Volume II – Financial Proposal.
- **Page 46, Section 5.4, Financial Proposal** - The Financial Proposal shall contain all price information in the format specified in **Attachment B**. The Offeror shall complete the Financial Proposal Form only as provided in the Financial Proposal Instructions and the Financial Proposal Form itself. Do not amend, alter, or leave blank any items on the Financial Proposal Form or include additional clarifying or contingent language on or attached to the Financial Proposal Form. Failure to adhere to any of these instructions may result in the Proposal being determined to be not reasonably susceptible of being selected for award and rejected by the Department
- **Page 47, Section 6 Evaluation and Selection Process** - Evaluation of Proposals will be performed in accordance with COMAR 21.05.03 by a committee established for that purpose and based on the evaluation criteria set forth in Section 6.2. The Evaluation Committee will review Proposals, participate in Offeror oral presentations and discussions, and provide input to the Procurement Officer. The Department reserves the right to utilize the services of individuals outside of the established Evaluation Committee for advice and assistance, as deemed appropriate.
- Current Contract Information:
 - **Current Contractor: SB & Company, LLC**
 - **Start Date: September 1, 2017 End Date: October 31, 2022**
 - **Contract Not to Exceed: \$189,190.00**
- The Conference was opened for questions, concerns or comments. There were no questions asked, during the Pre-Proposal Meeting. Jackie Wright, OFP, confirmed all businesses must be certified with GOSBA in order to be eligible to receive the contract. Paul Dickman, Procurement Officer, made note of the Acceptance of Terms and Conditions from **Section 4.17**, which indicates by submitting a response to this Solicitation, an Offeror is agreeing to all of the terms and conditions set forth in the RFP. If there are exceptions that an Offeror needs, then the exception must be disclosed up front along with the Offeror’s technical response. The State reserves the right to accept or decline the exception. Paul also strongly encouraged Offerors not to wait until the last minute to submit their proposal, as there may be navigational challenges in eMMA; and delaying the process to submit a proposal might result in an unsuccessful proposal submission due to missing the deadline listed on the Key Information Sheet. Octavia Robinson, Contract Monitor, made mention of the correction to the fiscal year dates originally

posted in the RFP on page 10. An Amendment to correct the fiscal year dates will be issued and posted to eMMA. Please see attachment labeled, “S00R2600001 – SFLP & MAHT Audit Services – Q and A - Pre-Proposal Meeting”

- ◆ Adjournment: The meeting closed at 10:18 a.m.